PeopleSoft HRIS 8.19

EMPLOYEE REVIEW PAGES

Plan Salaries Module

DATA ENTRY AND TRACKING

Review Period 7/1/02 – 6/30/03

Employee Review Pages in HRIS 8.19

This Guide is subject to change without notice, and is not intended to replace laboratory policy documents. If you find any problems with this Guide, please report them to LBNL HRIS Functional Group at HRIS@lbl.gov or call Amy Lowe at x5044.

Plan Salaries Module

EMPLOYEE REVIEW FY2003

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HRIS System Overview

The Employee Review pages are part of the Plan Salaries Module.

There are two LBNL processes used in the Plan Salaries module.

1. **Employee review dates, ratings, and peer groups.**

2. **Salary administration will NOT be covered today.**

The Employee Review pages contain both the Annual and Probation Review data. Only the annual review process is covered in this document.

Annual review period: 7/1/2002 – 6/30/2003

Probation reviews period: the 6 months after any employees hire date.

What ?

Union Represented Employees:
Employee Review = Performance Progress Review = P2R

Non Represented Employees:
Employee Review = Performance Review and Development = PRD

Annual Review Period End Date is 6/30/03

How to Get an Operator ID and Password

HRIS Access requests must be approved and requested by the appropriate HR Center manager.

HR Center Managers are Authorized to Request Access:

Computing Sciences	Chris Diesch
General Sciences/LabDir	Colette Gooch
Energy Sciences	Kamala Green
Mat Sc/Chem Sc/ALS	Robert Pettit
Life Sc/Phys Bio/JGI	Nancy Talcott
Technical Services	Gary Lee
Business Services	Diana Attia

All Requests must be sent to
Daisy Guerrero at DCGuerrero@lbl.gov

Which employees will have an Annual Review?

FY2003 review period includes the following employee classification codes (review record must exists for the automated salary process, rating is optional):

Code	Description
A	Term Appointment (Review Required)
I	Intern (Review Required)
N	Career (Review Required)
Q	Rehired Retiree (Review Optional)
T	Limited (Review Optional)

* Review for all other classifications is optional

And includes employee status codes:

Code	Description
A	Active
L	Leave of Absence
P	Leave with Pay
S	Suspended

There is a "review record initialization process" that will create a blank review record for all eligible employees if they were hired before 2/1/2003.

A person hired after this date is expected to be on probation and should have a probation record. Probation records will allow for automated salary administration of the record. The probation review end date must be 6/30/03 or earlier.

Probation Reviews:

Probationary reviews will not be auto-inserted, and must be added individually when the employee is hired.

Probation Review entry and tracking is not included in this document although the basic procedures for add and update is the same.

The FY2001 Employee Review Dates to Keep in Mind

These dates are for the 2001 Employee Review period.

Early July   Hands-on Training

8/31/01   Rating should be in System before salary administration begins.

Mid Aug   Recommended All Review Records are "Complete" in System prior to begin of salary administration

Employee Review Business Process Check List

1 Update all Job Code, OrgCode and Supervisor Assignments in the employee Job Data in Administer Workforce.

⇒ *The Employee Review pages will auto-load with data from the Job Data pages and will not be updated if Job Data changes. It will be easiest if all Job Code changes are completed before peer group development or initializing the Employee Review page.*

- To review your divisions' current data, run the Public Query: DIVISION ROSTER DETAIL.

- Also review for terminated supervisors, run Public Query: QA_TERMED_SUPERS_STILL_USED

2 Review and Update the Peer Group Table.

⇒ *Important: The sort order of the salary grid will be based on peer group. Sort order is – Ranking (optional), Peer Group, Rating and Compensation Rate.*

- To review your division's current peer group table data, from the menu run the Public Query: P2R PEER GROUP LIST.

- To update the table select, Setup, Review Peer Group Table, and enter your division Level 1, click OK.

3 Enter blank or "initialized" Employee Review Rating records.

⇒ *Use the process to add new records for this year, it will reduce the data entry time.*

- From the menu select Process, Initialize Employee Review. Enter you run control ID, click OK then, enter the Level 1 and union code and click Run, then OK in the next page.

4 Maintain the Employee Review data.

⇒ *To update the blank or initialized row of data you must use correction mode. Correction mode is not necessary to add a new record if one does not exist.*

- From the menu select Use, Employee Review, check the correction mode box on the search page or click correction button when you are in the Employee review page, either way you will be changed to correction mode.

How to Open the Plan Salaries Module

HRIS Login Procedure
The url for HRPRD is: http://hrsrv.lbl.gov:8000/servlets/iclientservlet/HRPRD/?cmd=start&

1. Using Internet Explorer, type "hris.lbl.gov/HRPRD" in the URL, the login page will display
2. Enter your PeopleSoft Operator ID (case sensitive)
3. Enter your password (case sensitive)
4. The window opens to the Home page with your menu groups.

This document covers the procedures relating to the **Plan Salaries (GBL)** module.

Roadmap from the Employee Review page:
> **Home> Administer Workforce > Plan Salaries (GBL)**

Employee Review Components

There are two primary components for Employee review.

Use – **Employee Review** to access active employee records.

Use – **Employee Review Historical** to access terminated employee records.

Setup Peer Group Table

PEER Groups are important in the Salary Review Process but are set up in the Employee Review Process.

Peer groups are set up by either

> ***- Specific* with job codes**

> ***- Generic* without a job code**

Creating an employee review record will auto-fill a specific peer group code according to how the job code is defined in the peer group table.

Generic peer groups will not auto-fill in the employee review page. Generic peer groups must be assigned manually from the value list.
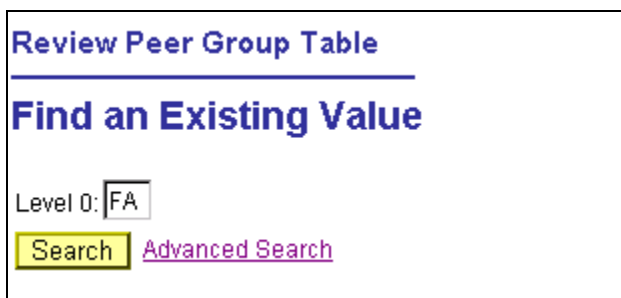
Procedure – Add or Update a Peer Group:

The peer group table is effective dated. Peer groups and Job Codes should NOT be deleted from the table.   New records should be added and unwanted data should be made inactive.
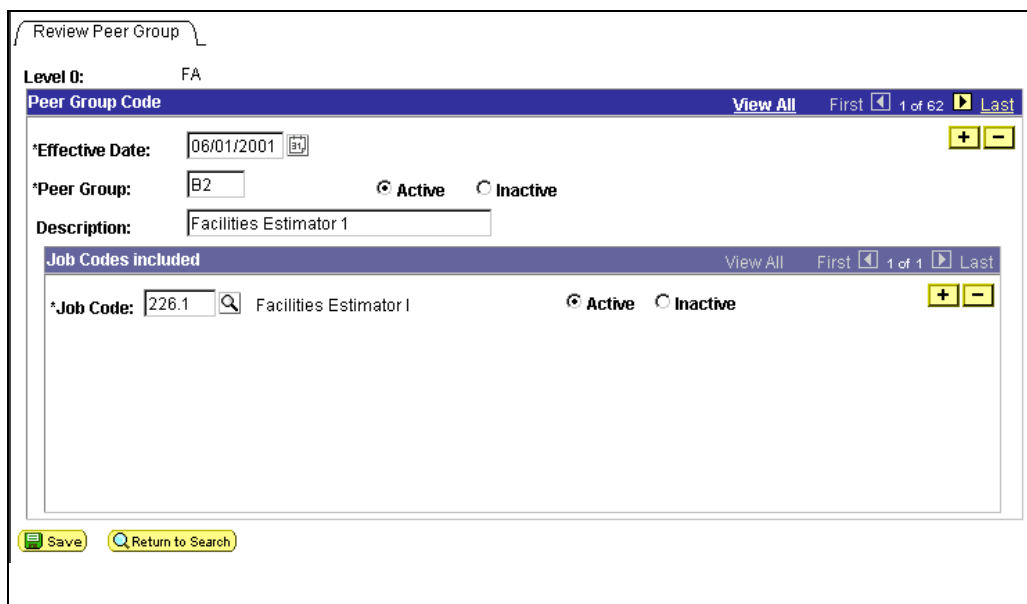
Note: A peer group must be active and have an effective date earlier than the employee review record in order to be available in the employee review record.

For new peer groups in FY2003 use 06/01/2003

1. Select *Setup, Review Peer Group Table*, the following page will appear:

2. Enter the Level 0 (same as Level 1), the following window will appear:

3. Click into the Effective Date field to be sure you are working in the main frame of data (the outer scroll bar)

4. To add a new peer group, click outer scroll area "plus" (+) button. *A blank row will display.*

5. Enter the Effective Date, Peer Group and Description for the peer group.

6. To add a job code to a peer group, click into the blank job code field in the embedded frame (inner scroll area). Enter the job code and select the active radio button.

7. To add multiple job codes to the peer group, click the inner scroll area "plus" (+) button to add a blank row. Enter the job code and select the active radio button.

8. Click Save.

Note: A peer group must have an effective date earlier than the employee review record and be active, before it can be used in that employee review record.

For new groups in FY2003 use 06/01/2003

Initialize Employee Review Records

The initialize process auto-inserts a blank employee review record for the current year.

REMEMBER TO UPDATE YOUR Job Data and Peer Groups BEFORE INITIALIZING!

Note: This process will create a review record for all eligible employees if they were hired before 2/1/2002. Probationary reviews will not be auto-inserted; they will be listed with a blank review record in the P2R Tracking Queries.

Procedure– "Initializing' the Employee Review Page

The Initialize process runs by Level 1 and union code. The results can be reviewed by running the Public Query: P2R Tracking by Employee.

1. Select **Go, Administer Workforce, Plan Salaries**.

2. Then select **Process, Initialize Employee Review, Update/Display**.

3. Enter your **Run Control ID**.

4. Enter Prompt: SetID = **LBL01**, **Level 1** and **Union Code.**

5. Click the **Run** icon.

6. In the Process Scheduler Window:
    Run location: client
    Output destination: either file or printer
      (there is not hardcopy output).

Peer Group Assignment in Review Record

When a job code is assigned to a specific peer group, that peer group will auto-fill in the employee review record at the time of creation.

To change the auto filled peer group,

1. Un-check the **Use Job Code** field, and

2. Pull down the value list on the **Peer Group** field to select another peer group. Only peer groups with no job code assignment in the Peer Group Table will appear in the value list.

Note: the **Use Job Code** Button allows for the predefined Peer Group to pre-fill from the Peer Group Table. If you wish to change to Peer Group, first un-select the **Use Job Code** box. Then, select from the value list of Peer Group.

Maintaining Employee Review Data

Roadmap

This is the page for Employee Review data entry.

The top Employee Review record on displayed for an employee may be for a previous year if no review has been entered for that employee since then! A blank employee review record means that there is no row and you can populate the blank one presented.

The review date must be after the review period end date. Example: Start is 7/1/02 and End is 6/30/03 then the Review Date should be something like 6/30/03 or 7/5/03

Review type "Annual" will auto fill the Star and end date for the current review period.

To add a new record *Correction mode is not necessary***, simply click the "Plus" button to add a new row.**

To update an existing record use *Correction* **mode, click the "Correction" button at the bottom of the window.**

Procedure - Add an Single Employee Review Record

Roadmap

1. Select *Use, Employee Review*. Enter the criteria for the records you want to work with.

2. Use the **"plus"** button to add a row – or – if the row is blank then update the blank row.

3. **Enter** data as necessary.

   The review date must be after the review period end date. Example: Start is 7/1/02 and End is 6/30/03 then the Review Date should be something like 6/30/03 or 7/5/03

   Review type "Annual" will auto fill the Star and end date for the current review period.

4. **Save** your record.

Rating Codes for this Review Period:

Represented will use the same as last year – single character and the P2R Form
Non-represented will use the new rating codes – double character and the PRD Form.

Value List:
N/A - Not Applicable
nonrep - AC - Acceptable
nonrep - EX - Excellent
nonrep - GD - Good
nonrep - MI - Marginal/Req Impr
nonrep - OS - Outstanding
nonrep - UN - Unsatisfactory
nonrep - VG - Very Good
rep - E - Exceeds Expectations
rep - I - Improvement Needed
rep - M - Meets Expectation
rep - N - Does Not Meet Expect
rep - O - Outstanding

The Employee Review Page

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Employee Review

Lowe,Amy                                                EmpIID:  294751

Review Details                         Find | View All    First ◄ 1 of 1 ► Last

*Review Date: 06/30/2002 [📅]        Review Type: Annual ▼        [+] [−]

*From/To:    07/01/2001 [📅] 06/30/2002 [📅]   Next Review Date: 07/01/2003 [📅]

Orgcode:    HRIS    HR Information Systems        ADM   □ ASPR Completed?
                                                  PD Completion [        ] [📅]
Job Code:   B40.3   Senior HRIS Analyst          Date:
                                                  Review Dt  [        ] [📅]
Rating Scale: [LBL] [🔍] Lawrence Berkeley Lab    Signed:

Review Rating: NonRep-GD-Good          ▼         Union Code:   99

Review Status: Complete ▼  RMI: [  ] [🔍]  □ Exclude?  ☑ Use Jobcode?

Ranking:     [0]   Peer Group: [HRIS] [🔍] HRIS

Evaluation Details                      View All    First ◄ 1 of 1 ► Last

*Evaluation Type: Supervisor ▼   Reviewer [176850]  [🔍] Coolahan,Cynthia C  [+] [−]
                                 ID:

Comment: This is test data for training purposes

(💾 Save)  (🔍 Return to Search)    (Update/Display) (Include History) (Correct History)
```

Req	Field Name	Description
*	Review Date	Date of the review document – should be 6/30/03 or later.
*	Review Type	Enter Annual or Probation.
*	From/To Date	Will auto-fill for current period when annual review type is selected.
	Next Review Date	Auto-fills start date of next period when annual review type is selected.
*	Rating Scale	Defaults to LBL.
*	Review Rating	Select from value list. (required for all except FX)
	Review Status	Select from value list. Will auto-fill as "initialized" when row is system generated.
	ASPR Complete?	Check if Annual Supplement to the Professional Resume is complete (required for FX except postdocs).
	PD Completion Dt	Enter date position description is revised.
	Review Dt Signed	Enter date Employee Review is signed.
*	RMI	Enter Relative Movement Indicator, (required for FX except postdocs).
	Exclude?	Check to exclude employee from salary review process. Record will not be included in the grid.
	Ranking	Enter a numeric value to rank emps within a peer group.
	Peer Group	Auto-fills from peer group table or select from value list.
	Use Jobcode?	Defaults as checked. Un-check to use generic peer grp.
	Eval Type	Defaults to "Supervisor". May use multiple instances.
	Review ID	Auto-fills with Job Data supervisor. Edit as needed but be sure to update JD.
	Comments	Enter as needed (optional)

Procedure - Update Employee Review Data in a Record

Caution: Correction mode will show historical employee review records and allows user to change data in any period.

Be sure you are editing a record for the correct period!

Roadmap

Home > Administer Workforce > Plan Salaries (GBL) > Use > Employee Review

1. Select *Use, Employee Review,* enter the criteria for the records you want to work with.

2. Use the **"Correction"** button to access the record in correction mode.

3. **Enter** data as necessary.

4. **Save** your record.

Rating Codes for this Review Period:

Represented will use the same as last year – single character and the P2R Form
Non-represented will use the new rating codes – double character and the PRD Form.

Value List:
N/A - Not Applicable
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nonrep - UN - Unsatisfactory
nonrep - VG - Very Good
rep - E - Exceeds Expectations
rep - I - Improvement Needed
rep - M - Meets Expectation
rep - N - Does Not Meet Expect
rep - O - Outstanding

Note: If record is "complete" be sure to enter the Review Dt Signed**. This is the employee signature date. If the employee refuses to sign, then enter the date signed by the supervisor and add a notation in the comment field.**

List of Public Queries for Employee Review Process

The following are PUBLIC queries available for your use. Save as a private query to modify.

1. **P2R_Tracking_by_Supervisor**
   a) Prints all active employees eligible for annual reviews in the requested period.
   b) Prompts for: Review Period End Date, SetID, Level 1
   c) Sorts by SupervisorID then Employee Name.

2. **P2R_Tracking_by_Employee**
   a) Prints all active employees eligible for annual reviews in the requested period.
   b) Prompts for: Review Period End Date, SetID, Level 1
   c) Sorts by Employee Name.

3. **P2R_PEER_GROUP_LIST**
   a) Prints all active peer groups includes job codes
   b) Prompt: Level 0

How to Run a Public Query

Accessing the Query Manager

Roadmap

<u>Home</u> > <u>PeopleTools</u> > <u>Query Manager</u> > <u>Use</u> > Query Manager

How to Run an Existing Query without 'opening the query'

1. **Search for the Query** you wish to run

    - Enter a partial query title and click the Search button (use wildcard, see Appendix A)

    - Leave search criteria blank to view all available Queries

2. Click **Search button** to list available Queries

3. Click the **Run link** on the row for the title you wish to execute, a separate IE window will open to display the prompts and results.

4. Enter **Prompts if applicable** and Click the View Results button. If the query has no prompts your query results will be displayed.

5. Results will display in IE html page. Data can be viewed or downloaded to your desktop.

6. To down load to Excel –**Use the "CSV Text File" link**. <u>Do Not</u> use the "Excel Spreadsheet" link.

    - *CSV Text File link* creates a simple text file that is automatically opened in Excel and easily formatted

    - *Excel Spreadsheet link* creates an excel file with very unfriendly formatting. Not recommended.

7. Save the CSV file to your desktop, rename if desired.

8. Double click the CSV file on your desktop and the file will open in Excel. Format the file as needed. See Query Excel formatting tips listed a below.

9. To exit the query, Close the Query – Results IE window.

10. To run a new query, Activate the Query Manager IE window, it should still be open but minimized.

NOTE: A query must be "SAVED" before it will run. If you edit any part of a query you must first save it before running.

Tips on formatting your Query Output

1. When you first open the CSV file, always format the spreadsheet ad save.
    a. Select all cells in the spreadsheet using the top left cell.   Hot Key: Ctrl-A
    b. AutoFit the column width – Format, Column, AutoFit Selection.   Hot Key: Alt-O,C,A
    c. Left Justify all columns – click the Align Left tool bar button
    d. Change the .CSV format of the spreadsheet - Save your CSV file, edit the "Save as type" to be Excel Workbook, Click OK.

2. Use Excel's Format, Cells menu option to standardize field by column. Fields that we suggest formatting are: Numbers (including emplid), Dates, and Time.